

5.1.0 ASSESSMENTS

There are three steps in determining an individual's eligibility for placement on the W-2 ladder (Unsubsidized Employment, Trial Job, Community Service Job, W-2 Transition). First the FEP must determine nonfinancial eligibility. In order to be nonfinancially eligible for a W-2 employment position, an applicant must meet all of the criteria listed in section 2.2.0. If an applicant meets the criteria, the FEP must then determine financial eligibility using the criteria found in section 3.1.0. For an individual who passes both the nonfinancial and financial eligibility tests, the FEP must then place the applicant on the most appropriate rung of the W-2 ladder. To determine the most appropriate placement, the FEP must complete an assessment.

Under W-2, the assessment process is one in which a W-2 applicant or participant's potential employability is evaluated. At a minimum, the assessment process must consist of an *informal assessment* of each individual's work history, recent job search efforts, education, job skills, interests and abilities and other factors that will affect employment. The assessment process may also include *screening* for specific limitations or barriers as well as referrals for *formal assessments* by qualified assessing agencies or individuals.

5.1.1 Informal Assessments

The purpose of the informal assessment under W-2 is to gather information about an individual and his or her family to determine the:

- Individual's ability to become employed and remain employed;
- Services and activities necessary for the individual to become employed and remain employed;
- Appropriate placement of a participant on the W-2 employment ladder;
- Need for further screening by the FEP;
- Need for a formal assessment by a qualified assessing agency or individual.

5.1.1.1 *Informal Assessment at Application*

The FEP must conduct an informal assessment prior to placing an individual in a W-2 placement.

Persons requesting W-2 services meet first with a Resource Specialist (RS). The RS prescreens applicants and determines whether or not exploring W-2 eligibility is appropriate for the applicant. The RS may require an applicant who appears ready for unsubsidized employment to participate in an up-front job search as part of the assessment. (See Up-Front Job Search) The W-2 agency must start an Employability Plan for any applicant who is required to do up-front job search. Applicants who choose to continue with their application must meet with a Financial and Employment Planner (FEP) within five working days of the date the W-2 agency receives a signed application.

The FEP has seven working days from the initial meeting with the applicant to determine nonfinancial and financial eligibility and, if eligible, which W-2 placement is

Chapter 5 ASSESSMENT AND UP-FRONT JOB SEARCH

most appropriate. Appropriate placement is based on an informal assessment of the applicant's work history, recent job search efforts, education, job skills, interests and abilities and other factors that will affect employment. In addition, as part of the informal assessment process, the FEP must take into consideration all family-related needs that may be impeding the participants ability to find and retain a job. A family emergency or a participant's inability to access a particular supportive service is a factor that the FEP must consider when developing the Employability Plan.

The FEP must review the following checklist with each participant when performing an informal assessment at application and as a part of ongoing case management, taking into consideration both short- and long-term needs. The FEP must work with the participant to identify resources that will address an unmet need, paying close attention to the services available through the W-2 agency's Children's Services Network.

- Emergency needs;
- Housing needs;
- Household budgeting/money management needs;
- Education and training needs (Participant and other family members);
- Legal assistance needs;
- Employment support needs (i.e. Work Connection and Retention Services);
- Child care needs (including after-school);
- Transportation needs;
- Personal and family health care needs; and
- Other needs identified by the participant that impedes his or her ability to participate in W-2 activities or find and retain a job.

If the applicant meets the nonfinancial and financial eligibility criteria, but is employed or has a strong employment history and skills, the applicant may be placed on the Unsubsidized Employment rung of the W-2 ladder (Chapter 7). Individuals who meet nonfinancial and financial eligibility criteria and present barriers to unsubsidized employment must be placed in a paid W-2 placement. If the individual declines the appropriate placement (as determined by the FEP), the individual is not entitled to another placement and can be denied W-2 services. The application process can be extended up to 30 days only if the applicant needs extra time to meet verification requirements.

The FEP may need to schedule additional meetings during these seven days to complete a more detailed informal assessment to facilitate appropriate placement. This may include the use of screening tools to further investigate cues or behaviors that may be consistent with significant limitations or barriers to employment. W-2 agencies are encouraged to consult with other Job Center partners, and accept previous assessments done by other agencies if appropriate. The FEP must not assume that participants who have a disability are unable to participate in a position higher than W-2 T, including unsubsidized employment. The FEP must document all assessment information in CARES utilizing the appropriate CARES screens, including case comments. The CARES assessment screens must be completed at placement and updated at each placement change. Highly sensitive, confidential information must be documented in a way that protects the participant. See Chapter 4 regarding the documentation of sensitive information in CARES.

5.1.1.2 *Screening and Screening Tools*

During the informal assessment process, the FEP may conduct a screening in order to identify the potential presence of or the potential risk for limitations or barriers to employment. An agency may choose to perform screenings on all applicants or participants as part of the W-2 placement process. Although an agency may choose to perform screenings on all applicants or participants, W-2 agencies are not required to conduct screenings or use any specific type of screening tool during the informal assessment process.

When the results of a screening show signs that a limitation or barrier exists, it generally necessitates further formal assessment by a qualified assessing agency on that condition.

The Case Management Resource Guide, located in Appendix V of this manual, provides general information and a framework for organizing additional resources related to screening for job readiness, employment barriers and making appropriate referrals. In addition, the guide provides a number of screening tools used to identify specific barriers, such as domestic violence, mental health issues and alcohol and other drug abuse (AODA) issues.

5.1.1.3 *Informal Assessment As A Part of On-Going Case Management*

An informal assessment must be made prior to moving an individual to another rung of the W-2 ladder including the unsubsidized employment rung.

Informal assessments are considered an on-going activity and are part of general W-2 case management. Again, the FEP must document all assessment information in CARES utilizing the appropriate CARES screens, including case comments. The CARES assessment screens must be completed at placement and updated at each placement change. Once an assessment has been completed and the decision has been made to change the W-2 participant's placement, the decision must be discussed with the participant and the participant's employability plan must also be updated to accurately reflect the new placement. Although a participant placed on the unsubsidized employment rung does not have to have an employability plan, FEPs are encouraged to develop plans for these individuals so that they clearly understand the services being provided.

5.1.2 **Up-Front Job Search**

Either or both parent(s) applying for W-2 assistance may be assigned up-front job search as a condition of eligibility to receive W-2 assistance. The Resource Specialist and/or Financial Employment Planner (FEP) should assign up-front job search, when appropriate, for all adult applicants in the W-2 group. However, applicants, who are not considered ready for unsubsidized employment, must not be required to conduct an up-front job search.

Chapter 5 ASSESSMENT AND UP-FRONT JOB SEARCH

EXAMPLE: Laura J. has been repeatedly dismissed from unsubsidized employment positions because of her attendance problems and difficulty taking direction from superiors. If the FEP believes she would be appropriate for a CSJ, she would not be placed in a two-week up-front job search as a condition of eligibility because the FEP has already determined that Laura is not capable at this time of finding and maintaining unsubsidized employment.

The assignment of up-front job search may take place while the applicant is waiting to meet with the FEP, while submitting required verification, or while the FEP is determining if placement in a W-2 employment position is appropriate. While unsubsidized employment is the highest rung on the employment ladder, only applicants who are considered job ready and who can benefit from job search may be assigned unpaid up-front job search as a condition of eligibility. If the applicant, without good cause, does not comply with the up-front job search requirement, the FEP may deny the applicant further W-2 services, including case management. The W-2 agency must assist a participant in the employment search.

If the Resource Specialist assigns an applicant, who appears to be job ready, to up-front job search before the FEP interview, the FEP should review the applicant's progress and determine the appropriateness of a continued job search. All up-front job search needs to be recorded in the applicant's Employability Plan. (See 6.1.0)

Applicants required to do an up-front job search are not eligible for a W-2 cash benefit, but may be eligible for Medical Assistance, food stamps, child care, Emergency Assistance, and a Job Access Loan.

Any voluntary job quit or job refusal without good cause during the up-front job search must be considered an appropriate and sufficient reason to determine failure to cooperate and may result in denial of a W-2 employment position and case management. (See 2.1.0.)

EXAMPLE: Sally recently lost her job and does not have obvious limitations which would prevent success in an entry level position. The FEP may require her to conduct an unpaid up-front job search as a condition of eligibility. If, after the first week, Sally has not found a job, the FEP should reassess the situation. If during further discussion the FEP identifies that there are legitimate reasons for her inability to obtain unsubsidized employment, despite attempts to find a job, the FEP may determine that she is not ready for unsubsidized employment, but might succeed at a Trial Job. At this point, Sally would be placed in a Trial Job.

5.1.2.1

Job Search Assistance Activities and Job Ready Preparation

Placement in job search may include job orientation or other job search activities that may enhance the applicant/participant's ability to find unsubsidized employment. Job search assistance activities are designed to assist and prepare a W-2 applicant/participant in conducting a successful job search. These activities focus on enhancing an individual's employability by introducing techniques and improving methods used to obtain employment.

Chapter 5 ASSESSMENT AND UP-FRONT JOB SEARCH

Job search assistance activities may include, but are not limited to:

1. **Job Readiness/Motivational Activities:** Help prepare a participant for work by learning general workplace attitudes, expectations, and behaviors necessary to successfully compete in the labor market. These activities help the participant build self-esteem and increase self-confidence. Activities include, but are not limited to:
 - Communication styles/personality types;
 - Communication skills/image;
 - Identifying and developing plans for short-term and long-term goals;
 - Identifying barriers to employment;
 - Career decision making skills;
 - Career exploration and vocational area identification;
 - Evaluate work patterns, skills and abilities; and
 - Mentorship, encouragement and support.
2. **Employment Counseling:**
 - Providing guidance in career decision making skills;
 - Career exploration;
 - Vocational area identification;
 - Training information;
 - Job seeking skills;
 - Expectations of the work environment; and
 - Ability to relate to others.
3. **Job Seeking Skills Training:**
 - Resume creation, preparation, development, and updating;
 - Job application completion;
 - Dissemination of labor market data;
 - Labor market forecasting;
 - Interview techniques including role playing, videotaping and critiquing, how to sell yourself;
 - Appropriate personal grooming/dressing;
 - Employment counseling;
 - Assertiveness;
 - Networking skills;
 - How to conduct a job search; and
 - Identifying jobs available and that may become available in the community.
4. **Individual Job Search:** One-on-one highly structured job search designed specifically for the participant who may not be appropriate for group job search. Some participants do not function well in groups for a variety of reasons. Others have completed training or have outstanding skills and qualifications and do not need the structure of a group. Some participants have specific instructional need levels. For example, W-2 agencies may offer bilingual support for job contacts/interviews.

Chapter 5 ASSESSMENT AND UP-FRONT JOB SEARCH

5. **Group Job Search:** Extensive job search activity which meets on a regular basis and follows a structured group process model such as Job Clubs. Group dynamics play an important role in the interchange of information, experiences, emotional support and job leads.
6. **Job Survival/Retention:**
 - Rules and expectations of employers;
 - Qualities employers desire in an employee;
 - Punctuality;
 - Attendance;
 - Following directions;
 - Teamwork;
 - Getting along with others;
 - Planning for emergencies;
 - Time management;
 - Reasons individuals lose jobs;
 - Dependability; and
 - Mentoring/job coaching opportunities.
7. **Job Development:** Agency directed activity that concentrates on soliciting job openings, marketing participants to employers and securing job interviews for participants. Job development expands the area and number of potential places participants may apply.
8. **Life Skills Training:** Life skills are the tools that provide the basic foundation necessary in the home to enable the parent(s) to participate more fully in the workforce, in lifelong educational opportunities and in community activities. Practical life skills increase a person's self-esteem and facilitate the pursuit of better job opportunities by providing the ability to stabilize family issues. The following are examples of life skills that assist the parent in understanding and managing daily life and family stress in order to succeed in the workplace:
 - Understanding and accepting parental responsibilities;
 - Strengthening parental skills/understanding relationships;
 - Family budgets;
 - Anger management/interpersonal skills;
 - Problem solving/decision-making skills;
 - Family nutrition/household management;
 - Time management;
 - How to work with government, legal and school systems;
 - How to request reasonable accommodations, knowledge of equal employment laws;
 - Selecting quality child care, planning for back-up child care for emergencies and when the child or provider is sick; and
 - Appropriate personal grooming/dress.

Applicants who are placed in employment positions must continue appropriate on-going job search and meet W-2 participation requirements. If the applicant is placed in an employment position, job search activities are counted as part of a participant's

work hours. However, for W-2 employment position participants, job search activities must be used concurrently with scheduled work site training activity.

5.2.0 FORMAL ASSESSMENT

Some applicants may require a more formal assessment for the FEP to determine the applicant's appropriate level of participation. A formal assessment will help establish the extent and severity of a limitation and, potentially, what alternative services or accommodations in unsubsidized employment or work assignments might permit the participant to engage in work, either immediately or after services have been provided. All formal assessments must be completed by a qualified assessing agency or individual (see Appendix I for definition of *Qualified Assessing Agency*).

A FEP can determine the need for a formal assessment at any point, however, a formal assessment is required when:

1. A participant is placed in a W-2 Transition position. Participants placed in W-2 T must have a formal assessment scheduled and documented in CARES within 30 calendar days of placement into W-2 T. (See 7.4.2.1); or
2. The FEP identifies or observes through either an informal assessment or the screening process conducted during an informal assessment cues that necessitate further assessment or definitive diagnosis by a qualified assessing agency or individual.

Other signs that a formal assessment may be necessary include, but are not limited to:

- Difficulty hearing or comprehending what you are saying;
- Frequent loss of employment;
- Claims to have a barrier to employment that can only be confirmed through a formal assessment;
- Cannot read;
- Difficulty communicating orally;
- May have mobility, cognitive, self-care, self-direction and work tolerance barriers;
- Exhibits socially inappropriate behavior;
- Exhibits behavior consistent with alcohol or drug abuse;
- Exhibits or describes any other behavior or problem that would severely affect employment;
- Difficulty mentally adding or subtracting numbers;
- Difficulty remembering how to spell simple words;
- Indications of limitations or barriers identified through the use of a screening tool;
- Exhibits behavior which may indicate mental health problems that would affect job placement; and
- Needs to care for an incapacitated W-2 group member.

A formal assessment may be counted as participation in an employment position. The FEP should use the best information available from an informal assessment to initially place an individual in an employment position while the formal assessment is pending. However, a formal assessment must be initiated and documented in CARES within 30 calendar days. When results of the assessment are received, the FEP must use the results to determine if the placement is correct, if the W-2 activities are appropriate and if any necessary work-related accommodations need to be made. Any change made based on the formal assessment must be discussed with the participant and the participant's employability plan must be updated accordingly. Again, the FEP must document all assessment information in CARES utilizing the appropriate CARES screens, including case comments. The CARES assessment screens must be completed at placement and updated at each placement change.

5.2.1 Completing the Medical Capacity Form (DES-2012)

The Medical Capacity Form is the first step in a formal assessment when a participant says they have a mental or physical barrier to employment or the person exhibits such barriers. The information on the form assists in determining appropriate W-2 placement and activities within that placement. It identifies accommodations that must be taken into consideration when identifying activities and conducting a vocational assessment. It also specifies if further evaluation is necessary regarding the participant's ability to function in certain environments.

The Medical Capacity Form must be completed by a certified professional who provides care to the participant or a representative authorized by the professional. Examples include doctor, nurse, counselor, physician's assistant or a licensed clinical social worker (LCSW).

W-2 agencies may develop and use their own Medical Capacity Form as long as the elements from the State's form are included. Some agencies develop additional forms to submit to specified providers such as mental health counselors or AODA treatment providers. These forms gather more explicit information. An agency may choose to use these forms for specialty areas when they deem appropriate.

5.2.1.1 *Obtaining Updated Medical Capacity Form Information*

The FEP must obtain new medical information when appropriate. The updated information will assist the FEP in understanding a person's ability to participate. The form must be updated under the following conditions:

1. The date the restrictions expire, which appears on the second page of the form;
2. Six months from the date the FEP receives the form if the provider indicates that the restrictions remain in effect beyond 6 months or indefinitely; or
3. If the participant's condition changes.

When obtaining updated information, the FEP can contact the provider by phone, submit the form to the provider himself or herself or have the participant obtain an updated form. The FEP must document all contacts in CARES. If the FEP obtains

Chapter 5 ASSESSMENT AND UP-FRONT JOB SEARCH

a copy of the form without assistance from the participant, the participant may, upon request, review and/or obtain a copy of the completed form from the W-2 agency.

The restrictions listed on the form do not excuse participants from participating in W-2 activities. Rather, identification of any restrictions will assist the agency in identifying appropriate accommodations that it will provide in order to allow participation.

Example 1: Ms. Beach broke both legs in a car accident on July 4th. Because of the reported change in her health, the FEP asks Ms. Beach to have a Medical Capacity Form filled out by her doctor. Ms. Beach returns the form indicating bed rest is needed for the next 6 weeks, until August 15th, to allow her legs to heal and indicates that she will be re-evaluated at that time. The FEP updates Ms. Beach's employability plan to include the change in activities.

Six weeks pass and the FEP calls Ms. Beach to see how she is feeling and to evaluate her ability to participate in activities. Ms. Beach indicates that she will be involved in physical rehabilitation for 6 hours a week and is not sure if she is able to return to her work site at this time. The FEP has Ms. Beach re-submit a form to the doctor to obtain the updated information. The doctor confirms that she will be in physical rehabilitation for 6 hours a week for the next 2 months. The form indicates that she can return to classroom activities and limited work site activities as long as she does not have to be on her feet or do any sort of lifting for the next 2 months. The doctor indicates on the form her next evaluation will be on October 17th. The FEP adjusts Ms. Beach employability plan to reflect the doctor's restrictions.

On October 18th, the FEP contacts the doctor's office by phone and speaks to a nurse that works with Ms. Beach. She confirms that all restrictions have been lifted and Ms. Beach can return to activities. The FEP requests an updated Medical Capacity Form and Ms. Beach returns to her work site full time.

Example 2: Mr. Poole applies for W-2 after a recent heart attack. The FEP has Mr. Poole submit a Medical Capacity Form to his doctor. The provider indicates on the form that Mr. Poole is having bypass surgery in 3 weeks and indicates no activities are permitted. The form shows the restrictions remain in effect indefinitely.

The FEP contacts the nurse at the cardiac clinic and requests further information about recovery time and amount of time involved in activities. The nurse said the average recovery time is 8 weeks and a scheduled appointment for re-evaluation usually follows the 8th week. The FEP makes a note to follow-up with the provider 9 weeks from the date of the surgery to update Mr. Poole's progress.

The Medical Capacity Form indicates physical rehabilitation and nutritional counseling activities start the week after surgery. The nurse states that physical rehabilitation appointments are 3 times a week for two hours for 12 weeks following the surgery and nutritional counseling is once a week for 6 weeks. The FEP writes an employability plan to reflect the activities.

Chapter 5 ASSESSMENT AND UP-FRONT JOB SEARCH

The Medical Capacity form can be used as a communication tool between SSA and the W-2 agency on Supplemental Security Income (SSI) or Social Security Disability Income (SSDI) applications. The form can be shared with SSA at any point in the application or appeal process as long as the FEP obtains a written release of information from the participant. The participant can complete a release of information form from the W-2 agency or hand write a note that grants permission for the FEP to contact SSA. In addition, the FEP could have the participant complete the SSA Release of Information Form (3288) located at www.ssa.gov/online/ssa-3288.pdf. A release of information allows the FEP to obtain information but it does not give the FEP authority to automatically get appointment letters or decision notices regarding a W-2 participant's case.

If the Medical Capacity form conflicts with SSA's decision, the FEP may need to follow up with both SSA and the provider to obtain correct information. Conflicting decisions can be detrimental to participants who are seen as completely restricted from activity by the provider and deemed able to work by the SSA.

See the SSI Advocacy section for more information on assisting a participant with the SSI application process.

5.2.1.3 *Conflicting Medical Information*

If the FEP receives an updated Medical Capacity Form that conflicts with another statement or another form regarding health issues, the FEP must follow-up with the provider. This can be done over the phone. Some agencies have staff members with a medical background who handle the calls while others have FEPs call directly. Agencies are encouraged to set up internal processes to handle conflicting information. A third opinion, outside of the two conflicting reports, may also be appropriate.

5.3.0 **W-2 Eligibility for VISTA Volunteers**

The AmeriCorps*VISTA program is a federal service program designed to strengthen and supplement efforts to alleviate poverty. It is governed by the Domestic Volunteer Service Act (DVSA) of 1973, Title I, Part A, 42 USC 4951. The DVSA language demonstrates clear congressional intent to allow persons with low or fixed incomes to serve as volunteers without fear of loss of those benefits they would be otherwise eligible for or were receiving prior to their entrance into volunteer service. FEPs must use the following policies when determining eligibility for VISTA volunteers.

5.3.1 **Nonfinancial Eligibility for VISTA Volunteers**

VISTA volunteers applying for, or participating in, a W-2 employment position, shall not be required to search for unsubsidized employment throughout his or her participation in a W-2 employment position. (See 2.2.0)

5.3.2 **Financial Eligibility for VISTA Volunteers**

Chapter 5 ASSESSMENT AND UP-FRONT JOB SEARCH

Disregard AmeriCorps*VISTA income unless the VISTA agency director verifies that volunteers are receiving the equivalent of minimum wage. If the VISTA volunteer is receiving minimum wage or more, count the VISTA income in determining gross income. (See 3.2.7.6)

5.3.3 Assessment and Placement in a W-2 Employment Position

5.3.3.1 *VISTA Volunteers Applying for W-2*

FEPs must conduct an informal assessment of all W-2 applicants to determine the most appropriate placement in a W-2 employment position. If the FEP determines that an applicant is not ready for unsubsidized employment, the assessment information is used to place the applicant in the most appropriate W-2 subsidized employment position. Being a VISTA volunteer while applying for W-2 does not make the applicant more or less appropriate for any W-2 employment position. The FEP must still take into consideration the applicant's work history, recent job search efforts, education, job skills, interests and abilities and other factors that will affect employment when determining appropriate placement. VISTA does not allow volunteers to seek employment or accept employment training while serving in the VISTA program. The FEP must take this into consideration when assigning W-2 activities.

However, with the approval of the VISTA project supervisor, the VISTA volunteer may take advantage of W-2 services. If this approval is granted by the VISTA project supervisor, assigned case management activities must be included on the W-2 employability plan and, if in a CSJ or W-2T employment position, the participant must be held accountable for completing these activities.

Example: Mary, a VISTA volunteer, applied for W-2. As a part of Mary's VISTA project, she recruits local volunteers to repair, renovate and expand existing housing or to construct new homes at affordable rates in low income neighborhoods. Mary also had five years of work experience prior to becoming a VISTA volunteer. Mary was found both financially and nonfinancially eligible for W-2. Based on the FEP's informal assessment of Mary's work history and skills, the FEP determined that Mary was eligible for some case management services while serving in VISTA and she was placed on the Unsubsidized Employment rung of the W-2 ladder. However, according to VISTA policy, Mary must obtain approval from the VISTA project supervisor in order to participate in case management activities.

5.3.3.2 *W-2 Participants Who Become VISTA Volunteers*

Reassessment of a participant's skills and employability is part of ongoing case management under W-2. Becoming a VISTA volunteer may indicate that a participant has gained some or all of the necessary skills to obtain employment and, therefore, a reassessment may be appropriate at that time. Through an informal assessment, the FEP must determine whether or not the W-2 participant should continue in his or her current W-2 employment position or should be considered for a more suitable W-2 employment position.

Chapter 5 ASSESSMENT AND UP-FRONT JOB SEARCH

Example: Joan is a CSJ participant who was recently accepted by the VISTA program as a volunteer. Joan's VISTA project requires her to distribute information on child immunization programs. Based on an informal assessment, the FEP determines that Joan is still not prepared for unsubsidized employment and would benefit from continued CSJ services while participating in the VISTA program. The FEP also recognizes the valuable skills Joan will gain from her VISTA participation and the likelihood that this will have a positive impact on her obtaining unsubsidized employment in the future.

5.3.3.3 *Counting VISTA Participation as a W-2 Activity*

If placed in a W-2 subsidized employment position, a VISTA volunteer's service time must be included as a part of the participant's W-2 employability plan and the participant can have their W-2 benefits reduced if he or she fails to follow-through on VISTA participation. Although VISTA members serve full-time without regard to regular working hours and may, therefore, be working more than 40 hours a week, the FEP must only assign the W-2/VISTA participant the maximum number of allowable work training hours for the W-2 employment position. In order to determine whether or not W-2/VISTA participants are meeting their W-2 participation requirements, upon request by the FEP or the participant, the VISTA project supervisor (or other appropriate person from the VISTA sponsoring organization) will provide a bi-weekly certification that participants are still serving on the project. In keeping with the W-2 program's philosophy, it is suggested that it be the responsibility of the participant to submit these bi-weekly certifications; however, the FEP may work directly with the VISTA project supervisor to obtain the information.

5.3.3.4 *Appropriate Case Management Activities for W-2/Vista Participants*

Although VISTA does not allow its volunteers to seek employment or accept employment training, a VISTA volunteer may take advantage of the case management services offered under W-2 as long as he or she has approval from the VISTA project supervisor. Participation in the W-2 activities would not only increase the W-2/VISTA participant's future employability, but the participant can also utilize the skills obtained by participating in W-2 activities as a VISTA volunteer.

There are a number of case management services available under W-2 that would be appropriate for the W-2/VISTA participant. These include, but are not limited to:

- Providing information on and/or assessing eligibility for food stamps, child care and Medicaid
- Establishing employment goals and exploring career options
- Providing assistance in creating a financial plan
- Providing referrals to other community resources
- Offering parenting or life skills training
- Writing a resume
- Completing job applications *
- Arranging job interviews with employers *

* These services should be offered only near the end of the participant's service in VISTA. Dates of VISTA service can be verified by the Wisconsin state program office of Corporation for National Service (414-297-1118).

5.3.4 Eligibility For Time Limit Extensions

VISTA participation does not guarantee eligibility for an extension. As with all W-2 participants who reach their time limits, the FEP must review the W-2/VISTA participant's eligibility for an extension using the W-2 extension criteria. The only exception is that the W-2/VISTA participant's failure to seek employment or accept employment training while serving in the VISTA program and W-2 cannot be used to justify denying an extension.

The FEP must inform the participant and document in case comments that he or she will reach either the 24 or 60-month time limit while participating as a VISTA volunteer and that VISTA participation does not guarantee eligibility for an extension.

Example: Shari is in a CSJ employment position. Shari's CSJ requirements include VISTA volunteer service. In Shari's 20th month of W-2 participation, the FEP reviews the extension criteria with Shari and determines that although she has participated with program requirements, based on the skills obtained through W-2 and her VISTA volunteer service, the local labor market does not preclude reasonable job opportunities for Shari if she were not serving in VISTA. Therefore, she is found ineligible for a CSJ extension. Based on the decision, the FEP may offer to move Shari to the Unsubsidized Employment rung of the W-2 ladder in order to continue providing W-2 case management services. Because Shari is not allowed to search for employment or attend employment training opportunities during her VISTA service and, therefore, may not be penalized, Shari may get approval from her VISTA project supervisor to participate in case management activities. If Shari's project supervisor does not grant approval for Shari to participate in case management activities, Shari may be ineligible for W-2 services. However, Shari may reapply for W-2 services at any time and may choose to do so once she has finished her VISTA work.